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Wealthtech Weekly

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By Rob Burgess
Reporter

Most — 58% — of advisors surveyed say they rank speeding up workflows as a top driver of their firm's technology strategy, according to our recent AI Readiness Survey. And many are turning to AI tools to do just that.

But there is a trade-off many decision-makers may not have considered. Rather than simply saving time, a new UC-Berkeley study found that AI tools may be increasing the potential for burnout in employees as capacity expands.

Also this week:

- Firms are adding **AI tools for growth, not just efficiency**.
- Here is what **advisors should prioritize when evaluating tech purchases.**
- Vibe coding is **filling the white spaces in advisor tech stacks.**

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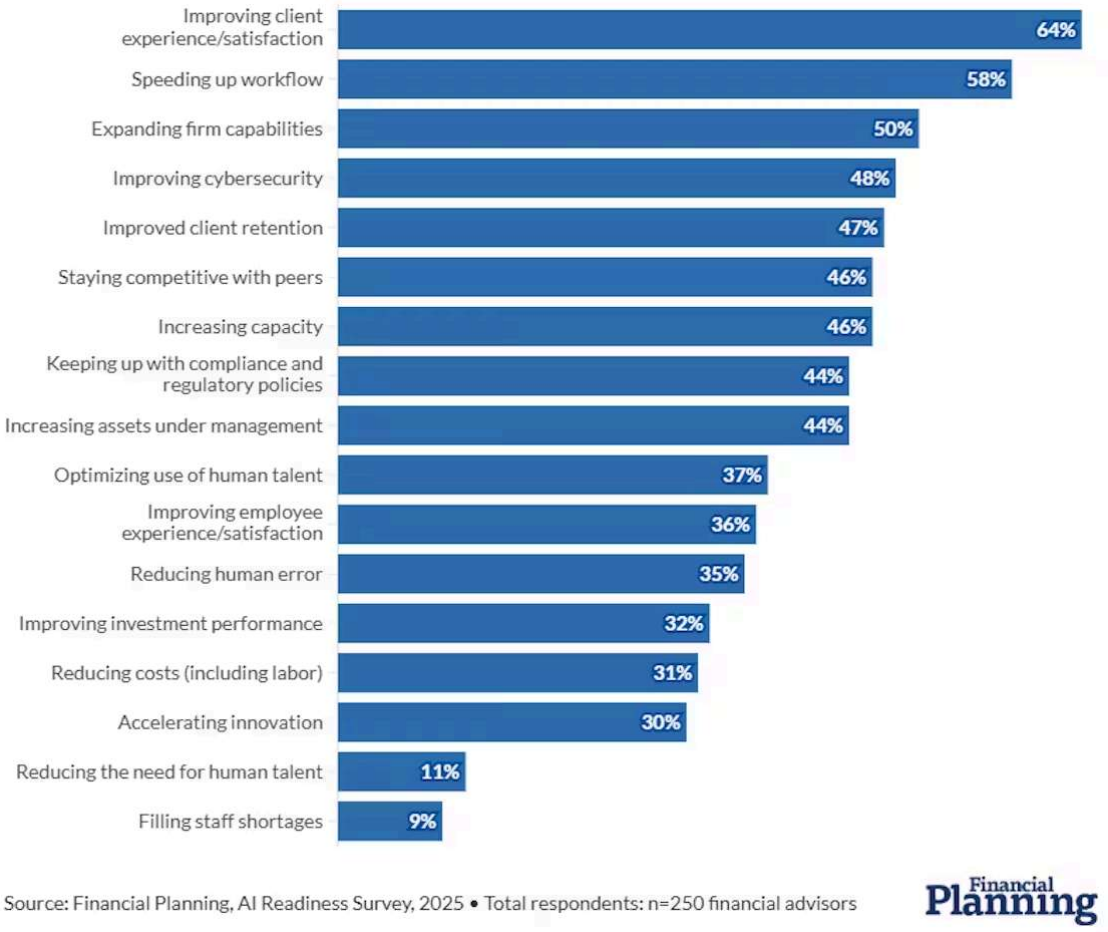
TECHNOLOGY

The AI tools meant to save time are burning out advisors


Improving client experience/satisfaction 64%
Speeding up workflow 58%
Expanding firm capabilities 50%
Improving cybersecurity 48%
Improved client retention 47%
Staying competitive with peers 46%
Increasing capacity 46%
Keeping up with compliance and regulatory policies 44%
Increasing assets under management 44%
Optimizing use of human talent 37%
Improving employee experience/satisfaction 36%
Reducing human error 35%
Improving investment performance 32%
Reducing costs (including labor) 31%
Accelerating innovation 30%
Reducing the need for human talent 11%
Filling staff shortages 9%
Source: Financial Planning, AI Readiness Survey, 2025 • Total respondents: n=250 financial advisors
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A UC-Berkeley study found that AI tools may get work done faster, but advisors and other workers are often using it to add to their workloads.

- **Advisors look to AI for growth, not just efficiency**

Wealth management firms are beginning to push AI beyond back-office use and toward growth, panelists at Future Proof Citywide said. Success depends on a thoughtful approach and clean data.

- **What advisors should prioritize when evaluating tech purchases**
  Not all tech integrations are created equally. Industry experts discussed what advisors should focus on when evaluating potential additions to their tech stacks.
- **How vibe coding is filling the white spaces in advisor tech stacks**
  AI is allowing advisors to build custom tools and processes without deep knowledge of coding. Still, some guardrails will be necessary to keep compliant.
- **Interested in vibe coding? Here's how advisors can start**
  Financial advisors who are curious about vibe coding have many free or relatively cheap options to help them get started.

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